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France

Product Brief

Aromas and Color Agents

2006

Approved by:

Elizabeth B. Berry
U.S. Embassy

Prepared by:

Roselyne Gauthier

Report Highlights:

Aroma and food coloring demands in France are driven by the French consumers preference for natural products and are used most prominently in the confectionery and biscuit industries.

Includes PSD Changes: No
Includes Trade Matrix: No
Unscheduled Report
Paris [FR1]
[FR]

Market Overview

1. Aromas

The food aroma industry in France is very small with total French sales of 300 million Euros (\$373 million) in 2005. The world market for this sector is estimated between 5-6 billion Euros (\$6-7 billion). This sector represents 0.22 percent of total French food industry sales (\$172 billion in 2005), and 0.45 percent of the total food industry employment (418,500 employee).

Percent of French aroma companies by employees

< 10 employees	7%
10 to 50 employees	46%
50 to 100 employees	14%
> 100 employees	33%

Source: French Food Aromas Industries Association (SNIAA)

The color of a food product is one of the first things a consumer notices and thus is very important in the perception of quality. French consumers tend to prefer colorants based on natural products. The whole food coloring market (natural and synthetic) in France is valued at \$1 billion, of which the natural food coloring represents \$250 million; red coloring itself is valued at between \$30-40 million.

Market Sector Opportunities/Company Profiles

1. Aromas

The French confectionery sector industry prefers to use new "fresh" sensations, while the salted and biscuit industry prefers to use aromas close to the authentic flavors.

Best-selling aromas are:

- ☐ Meat aromas: Meat aromas in France should be high quality and price competitive;
- ☐ Aromas for light products: Used to compensate for the lack of salt, fats and sugar in these products and to give them more flavor;
- ☐ Aromas with "spicy and cooked" flavors, such as parsley and basil flavors;
- ☐ "Cool and fresh" aromas: Flavors, such as mint, give a cool and fresh sensation; they are often used in the confectionery sector;
- ☐ Mixes of flower and fruit tastes: Generally used in the biscuit, pastry and confectionery sectors, these aromas are close to traditional recipes in the biscuit and pastry sectors;
- ☐ Butter, cheese, milk and cream aromas are finding new uses and are being used specifically in the biscuit industry.

2. Food Colorings:

The current trend favors natural food coloring extracts from fruits and vegetables. Most natural colorings being used in France originate from vegetables (plant extracts or trees), or from animals (insect extracts, for example). Colors offered are diverse, ranging from yellow to dark brown. Red is the most popular food coloring followed by yellow.

The different food coloring agents are classified as follows:

- ❑ Red variations with anthocyanine: Generally extracted from fruits and vegetables used primarily in the food industry;
- ❑ Lemon yellow to orange with curcuma: Curcuma is a plant originating from Asia. Its extract is used mainly in ice cream and yogurts but also in bread, cereals, cakes and cookies;
- ❑ Sun yellow to orange-red with carotenoids: Extracted from vegetable leaves, fruits, flowers, vegetables and roots. Their usage is quite broad, particularly in the beverage sector.
- ❑ Caramels: Obtained from heated sugar, caramel is the most popular world food coloring. It is used in a large variety of foods and beverages. It is cheaper than other food colorings and provides the required result in small quantities.

Major Groups/Company Profiles for Aromas and Food Coloring Agents

Company	Nationality
CHR Hansen	Multinational
Sensient Technologies Corporation	Multinational
D.D. Williamson	Multinational
Plantextrakt	Multinational
ADM Food Ingredients	Multinational
Ringe & Kuhlmann GmbH & Co.	German
Mane	Multinational
International Flavors & Fragrance (IFF)	Multinational
Robertet	French
Metarom France	Multinational
Givaudan	French

Market Access and Regulations

Aromas and coloring agents entering the EU and France are subject to customs duties which can vary. Coloring agents are EU harmonized and governed by EU Directive 94/36/EEC. The directive includes the following annexes:

- Annex I: List of permitted food colors. Only substances listed in this annex may be used;

- Annex II: Foodstuffs which may not contain added colors
- Annex III: Foodstuffs to which only certain permitted colors may be added
- Annex IV: Colors permitted for certain uses only
- Annex V: Colors generally permitted

Aromas/Flavorings: In an initial step to harmonize the use of flavorings in the EU, the European Commission compiled a register of all flavoring substances authorized in the different EU member states. Substances subject to restrictive or prohibitive measures in certain member states have been marked. This register has been updated by Commission Decisions 2004/357/EEC, 2005/389/EC and 2006/252/EC.

For more information regarding trade restrictions, food standards and regulations, please refer to FAS/Paris Food and Agricultural Import Regulations and Standards Report (FAIRS) available on Internet website: <http://www.fas.usda.gov>.
EU Regulations may be found at: www.useu.usmission.gov

Key Contacts and Further Information**1. French Government Agencies**

Agency responsible for French label/product ingredient regulations:

Direction Générale de la Concurrence, de la Consommation
et de la Répression des Fraudes (DGCCRF)
Ministère de l'Economie, des Finances et de l'Industrie
59, boulevard Vincent Auriol
75703 Paris Cedex 13
Tel: (33-1) 44 87 1717/Fax: (33-1) 44 97 3031
Internet: <http://www.finance.gouv.fr>

Agency responsible for promotion and control of food quality:

Direction Générale de l'Alimentation (DGAL)
Ministère de l'Agriculture et de la Pêche
251, rue de Vaugirard - 75015 Paris
Tel: (33-1) 49 55 4955
Fax: (33-1) 49 55 4850
Internet: <http://www.agriculture.gouv.fr>

For information on duties, taxes, and documentation:

Centre de Renseignements Douaniers
84, rue d'Hauteville
75010 Paris
Tel: (33-1) 825 30 82 63/Fax: (33-1) 53 24 6830
Email: crd-ile-de-france@douane.finances.gouv.fr
Internet: <http://www.douane-minefi.gouv.fr>

For further information contact:

Office of Agricultural Affairs
American Embassy
2, avenue Gabriel - 75382 Paris Cedex 08
Tel: (33-1) 43 12 2264
Fax: (33-1) 43 12 2662
Email: agparis@usda.gov
homepage: <http://www.amb-usa.fr/fas/fas.htm>

For more information on exporting U.S. food products to France, visit our homepage. The OAA homepage includes information on the HRI and Retail food sector, Food and Agricultural Import Regulations and Standards, product briefs on the market potential for U.S. products, upcoming promotional trade shows and fairs in France. Importer lists are available from our office to exporters of U.S. food products.

For more information on exporting U.S. agricultural products to other countries, please visit the Foreign Agricultural Service home page: <http://www.fas.usda.gov>

Average exchange rates:

Calendar Year 2004: US Dollar 1 = 0.806 Euros

Calendar Year 2005: US Dollar 1 = 0.8038 Euros

Source: Central European Bank and Central Intelligence Agency Fact Book